

Improve the Client Experience by **Implementing Practice Management Software**



Are you looking for ways to connect with your clients and provide better service? Our free, downloadable guide explains how backdocket's practice management software can help you put your clients first and drive long-term success.

Download the PDF to learn how practice management software can help you deliver exceptional service and boost client satisfaction.

IMPROVE THE CLIENT EXPERIENCE BY IMPLEMENTING PRACTICE MANAGEMENT SOFTWARE

Your law firm's long-term success and profitability depend on maintaining relationships with new and existing clients. You can provide your clients better service by using legal practice management software to streamline client intake, automate tasks, and send feedback surveys to help your firm provide a better client experience.

Discover how using integrated practice management software can help you make your clients feel valued at all times, increasing client satisfaction and referral rates.





STREAMLINED INTAKE PROCESS

A smooth and efficient intake process can help you make a great first impression on your clients. Using an integrated practice management software lets you add intake forms to your website to collect information about a potential client's contact information and details regarding their case.

Once a potential client completes a form, they receive an email from your law firm informing them that a staff member will contact them shortly. You can then set up an automated task reminder to call the client and schedule them for a consultation with an attorney as soon as possible.

ENHANCED CLIENT COMMUNICATION

Consistent communication helps keep clients updated about their case's progress, making them feel valued and confident in your firm's representation. Cloud-based practice management software lets you use integrated tools such as Office 365 and Google to help keep clients in the loop about how their case is going and let them know if you need them to complete more paperwork to support their claim.

Using these tools, you can boost client communication and write and store notes after your calls or meetings. When speaking to clients about ongoing cases, you can refer to these notes to help you keep track of previous discussions, client requests, and case-specific details. Integrated legal practice management software like backdocket ensures every conversation picks up right where the last one left off, making communication more seamless and personalized.





IMPROVED CASE COLLABORATION

Attorneys must juggle managing new clients and staying updated on the statuses of current cases, all while prioritizing clients' best interests. With backdocket's cloud-based practice management software, attorneys and staff members can access client case information and notes from anywhere, anytime.

For example, a client calls for an update about their personal injury claim. An attorney can pull up their notes from the software, refer to past conversations, and check the status of paperwork or court filings. If a client needs to sign a form, the attorney can create and assign a task to a staff member to send the form right away.

This remote collaboration eliminates the need to send and receive emails or calls back and forth, allowing for faster response times and more meaningful interactions with clients.

EFFICIENT DOCUMENT MANAGEMENT

Maintaining a document management system is critical to enhancing the client experience. Instead of searching through various records and or multiple software programs, your attorneys can easily access every client note using custom fields and search options in their practice management software.

Legal staff can quickly retrieve case notes, records requests, case statuses, and other documents as they speak with clients. Well-managed, organized documents allow attorneys to instantly provide clients with timely information about their cases and access important files whenever needed.





REAL-TIME CASE UPDATES

Clients appreciate being informed about the progress of their claims by their attorneys. Real-time updates help them better understand the status of their legal matters and manage expectations. They can also help clients prepare for upcoming court proceedings, such as hearings or trial dates.

With automated follow-up reminders, you can establish a transparent and open line of communication with your clients. You can program automated reminders to remind clients about important dates, such as depositions, court dates, and appointments. This proactive approach ensures that clients know about upcoming activities and can adequately prepare for them.

SEAMLESS BILLING PROCESS

A positive client experience is largely based on trust, which can be affected by your billing process. Clients expect a law firm to provide detailed, consistent billing and be transparent about all costs related to their cases, including lab fees and court filing expenses.

Your firm can streamline its billing procedures by implementing an automated billing workflow in practice management software. For example, you can generate and send invoices to clients for outstanding payments. These itemized invoices outline the services rendered and associated costs, making it easier for clients to understand and pay them on time.





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DEMONSTRATION.**

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